

Proposal Writing: Approaching The Approach

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Abstract—The approach section is the heart of most proposals because it describes the work to be done and details the tasks for performing that work. This article identifies the key elements that should be included in an approach section. It provides a simple technique for ensuring rigor of thought and structure to aid writers in proposing work concisely so that both the client and the contractor clearly understand the methods, activities, and output of each task.

THE approach section is the heart of most proposals. It is vital because it describes the work to be done and details the methodologies or tasks for performing the work. Clarity is essential because

- Language in the approach often becomes part of the contract language specifying services to be performed by the contractor.
- The approach tells the client what he or she will receive for the money spent.
- If the research tasks or services are complex, the approach explains how the elements of the project interrelate and why each activity is essential to the job.
- Activities described in the approach form the basis for managing and costing each job. Accuracy in describing activities is important to ensure timely completion of each job without cost overrun.

Many proposal writers do not know how to approach the approach because they are unsure of the key elements that comprise a good approach. Too often, extraneous information gets included—information that might better belong in the scope of work, or in the corporate qualifications, or in the management plan. Though the proposal writer may be an expert in his or her field and technically competent to solve the client's problems, a poorly written approach demonstrates fuzzy thinking. The result of apparently fuzzy thinking in the approach can be

- Confusion as to exactly what the client will receive, leading to misguided expectations on the part of both the client and the contractor, resulting in a dissatisfied client who expected one product but ended up with something different.
- Cost overruns, resulting from the approach which promised the impossible or intimated services to be provided that didn't really contribute to the project's objective.
- Loss of future business, the contractor having failed to deliver a useful product, resulting in mutual client-contractor dissatisfaction during the life of the contract.

Preparing a good approach section is not difficult if a writer understands the work to be performed—as well as the

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client's needs and constraints—and approaches the approach in a rigorous, structured fashion that demonstrates clear and precise thinking.

CONCEPTUALIZING THE APPROACH

The first step in approaching the approach is fundamental to all good contracting, be it for services, goods, or a combination. As a good mapmaker surveys the land before putting pen to paper, the proposal writer must understand the client's needs (the problem to be solved and the work to be performed) and the desired outcome (or output) of the project. If an established relationship with the client exists, or, in the case of sole-source work, if the eventual contract is presumed, understanding the client's needs may be presupposed. For competitive bids, the proposal writer must read the client's request for proposal (RFP), reread the RFP, reread it again, and then read it again. The RFP should be kept close at hand during and after the proposal-drafting process as a guide in addressing the client's needs.

Creativity in approaching the approach also is desirable, as long as it is appropriate to the work defined by the client. Alternative methods to problem solving and performing the work usually are an attractive element in designing a successful work plan. Being aware of the client's limitations (schedule, dollars, etc.) and the potential competition will help shape how creative the proposer can be in developing the work plan.

Let's assume that, as the contractor, you (1) are aware of those things, (2) have developed a work-plan concept, and (3) are ready to write. How should you approach the approach so that your ideas are expressed clearly and concisely, reflecting focused thinking and demonstrating that the client's needs will be met? The procedure is simple and the rules of thumb, if adhered to, will help produce an approach that clearly describes what is to be done and what the client will receive.

WRITING THE APPROACH

The approach should be written in terms of tasks or activities: task 1, task 2, etc. A rigorous, structured approach that describes each task will ensure that the reader understands the work to be performed and that the proposed work plan is well formulated and suitable for inclusion in the contract. Think of the following components in describing *each task*, and then put the thoughts into words:

- Purpose
- Activities
- Output (or product)
- Anticipated problems and solutions (optional)
- Timing (optional).

Purpose

Each part of the work must fulfill a specific purpose that contributes to the overall objectives of the project. Test each task's contribution to the project, identifying its reason for inclusion. If the purpose of any given task can't be determined easily, rethink your approach. The purpose should be described in no more than two or three sentences, preferably 40-50 words or less.

Activities

What will be done in each task? *Be specific!* Assume the reader's perspective as well as the project manager's perspective in identifying actions that will contribute to each task's purpose. For a research-oriented task, the various methodologies are described in this section. Describe the activities so that they demonstrate action that fulfills the stated purpose. Oversimplification and abstraction should be avoided as in "This method will be performed in accordance with standard research procedures."

- *Example:* A literature search is being proposed. The description of the activities might include what sources will be used; where the information will be found; how the information will be identified, gathered, and recorded; and whether the search is to be automated or performed manually.
- *Example:* A workshop is being proposed. The description could include how many people will attend; what types of people will be recruited; how they will be recruited; what the agenda will include; how the workshop will be moderated; and a description of the facility where the workshop will be held.

When describing activities or specific methodologies, you may refer to similar work done previously that demonstrates your ability to perform the work being proposed, particularly if you are unfamiliar to the client. (This information normally is included in the qualifications section of the proposal but can be *briefly* summarized when describing the proposed activities. It may lend credibility to your ability to perform the work.)

Output (or Product)

What will be the outcome of the activities that are described? By answering this question you are forced to identify concretely each task's contribution to the project. Additionally, you can demonstrate one task's relation to other tasks that follow. This is useful for the client's understanding of the proposal as well as for you, who must ensure that each task contributes to the project's overall objectives. This process tests internal validity by checking the value of each task. After describing the activities ask, "So what?" The answer should produce a clear definition (again in about two sentences and fewer than 50 words) of what the task's output will be.

Anticipated Problems and Solutions (Optional)

Some RFPs, particularly those from government clients,

may require you to anticipate problems and solutions in performing the work. When not specified in the RFP, use your discretion in referring to anticipated problems and solutions.

- *Example:* You are to perform a market analysis using industry information supplied by individual companies.
Anticipated Problem: The companies may refuse to provide some (all?) of the required information because they consider it company confidential.
Solution: Gather secondary information from the industry press (newspapers, magazines, professional journals) and from company annual reports.
- *Example:* You propose to install an automated electronic system (i.e., security, energy management, utility metering) in the client's building.

Anticipated Problem: The existing electrical system may be inadequate or faulty and this can be determined only after the job has begun.

Solution: Depending on the condition of the existing wiring, the building's electrical system may require modification.

The advantage of discussing problems and solutions is that you can demonstrate a broad understanding of the potential pitfalls of performing any given task and thus forewarn clients to expect the unexpected. By highlighting the solutions in advance, you show the client that you are prepared for a wide range of eventualities.

The disadvantage of discussing problems and solutions is that you may be alerting the client to a potential problem that may, in fact, never surface. This could cause undue anxiety or raise questions in the mind of the client. Additionally, the solutions presented in the proposal may not be the ones implemented should the problem actually occur. Finally, in anticipating problems in the proposal stage, you may not be anticipating the *real* problems.

Experience is the best guide in deciding whether to include the problems-solutions section in the task description. It is an excellent technique if you know that real problems can occur, particularly if you have had similar jobs in which such problems have occurred. Be careful not to "fish" for potential problems-solutions just to try to show your understanding of the client's situation. However, in thinking through the approach, consider potential problems even if they are not presented to the client in the proposal. These concerns should wait until the time comes to write a contract—after the proposal has been accepted.

Timing (Optional)

The last part of each task description might define the time to complete the task. Rather than let reviewers wait until they read the management-plan section of the proposal (where the task and project schedules are usually presented graphically), insert a sentence estimating the time to perform each task. This helps the client put the task into perspective and evaluate each task's relative importance to the project.

FORMATS FOR WRITING THE APPROACH

Proposal writers use a wide range of formats. The elements just described are flexible enough to conform to many proposal formats. They can be used as headings or be incorporated more subtly into paragraphs without distinct

headings. In either case, be consistent in presenting task descriptions.

Using the techniques described should help alleviate many of the anxieties you may have about approaching the approach.